Dowling, Michael D (for Carol Lynette Mattox – Executor)

Probate Status Hearing Re: Filing Inventory and Appraisal

		CAROL LYNETTE MATTOX, daughter,	NEEDS/PROBLEMS/COMMENTS:
		appointed executor with full IAEA	
		authority without bond on 09/24/2013.	
		•	
	nt. from	Letters issued on 10/04/2013.	
	Aff.Sub.Wit.	Minute order of 09/24/2013 set this	
	Verified	status hearing for the filing of the	
<u> </u>	Inventory	Inventory and Appraisal.	
	PTC	-	
	Not.Cred.	Status Report filed 02/11/2014 states the	
	Notice of	Inventory and Appraisal was mailed to Rick P. Smith, the appointed Probate	
	Hrg	Referee, on 02/07/2014 for his appraisal	
	Aff.Mail	of the estate assets. As of this date, the	
	Aff.Pub.	appraised Inventory and Appraisal has	
	Sp.Ntc.	not been returned from the Probate Referee.	
	Pers.Serv.	Kereree.	
	Conf.		
	Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202	4	
	Order	4	
	Aff. Posting	_	Reviewed by: LV
	Status Rpt		Reviewed on: 02/25/2014
	UCCJEA	4	Updates:
	Citation	_	Recommendation:
	FTB Notice		File 1 – Gover

Atty Johnson, Mark D., sole practitioner, Sanger (for Petitioner Helen Woodward, friend)

Amended Petition for Order Approving Establishment of Special Needs Trust

Ag	e: 61 years	HELEN WOODWARD, friend and Guardian ad	NEEDS/PROBLEMS/COMMENTS:
		Litem appointed on 10/30/2013 for the	Continued from 1/27/2014.
		purpose of filing the instant petition, is	Minute Order states Court sets
Со	nt. from 101613,	Petitioner.	the bond at \$52,514.00 .
	0614, 012714	Petitioner requests the Court establish the	Need proof of bond posted
	Aff.Sub.Wit.	DANIEL KANDARIAN SPECIAL NEEDS TRUST	by the Co-Trustees in the
,	Verified	based upon the following:	amount of \$52,514.00 to be
✓		Daniel Kandarian (proposed SNT)	filed with the Court pursuant
	Inventory	Beneficiary) is to receive \$50,000.00 as a	to the Court's order on
	PTC	result of settlement of his dispute with	1/27/2014 and California Rule
	Not.Cred.	SUZANNE COOPER, his sister and the	of Court 7.903(c)(5).
√	Notice of	Successor Trustee of the WANDA	
	Hrg	KANDARIAN TRUST (09CEPR00332; petition dismissed on 2/15/2011), over the validity	Note: Court will set Status
1	Aff.Mail	of the Wanda Kandarian Trust;	Hearing as follows:
Ė	Aff Dub	Mr. Kandarian is disabled and receives	• Friday, March 27, 2015 at 9:00
	Aff.Pub.	needs-based public benefits; he was	a.m. in Department 303, for the filing of the first account
	Sp.Ntc.	struck by a car while riding a motorcycle	of the SNT.
	Pers.Serv.	without a helmet in 1984, which seriously	Of file Sivi.
	Conf.	impaired both his physical and mental	Pursuant Local Rule 7.5, if the
	Screen	abilities; he requires a trust to provide for	document noted above is filed
	Letters	his care and to purchase a trailer for his	10 days prior to the date listed,
	Duties/Supp	personal dwelling;	the hearing will be taken off
	Objections	 After payment of costs of \$260.00 and attorney fees of \$2,000.00 from the 	calendar and no appearance
	Video	settlement, Mr. Kandarian will receive	will be required.
	Receipt	approximately \$47,740.00 , and outright	
	CI Report	distribution of the settlement to him as	
	9202	proposed SNT Beneficiary would	
✓	Order	eliminate his eligibility for SSI and Medi-	
	Aff. Posting	Cal;Petitioner seeks to establish a Special	Reviewed by: LEG
	Status Rpt	Needs Trust under Probate Code §§ 3602	Reviewed on: 2/26/14
	UCCJEA	– 3613, and an order authorizing	Updates:
	Citation	Petitioner to sign the proposed Special	Recommendation:
	FTB Notice	Needs Trust as grantor;	File 2 – Kandarian
		Petitioner requests that TOM AVEDISIAN	
		and LOUISE AVEDISIAN, first cousins of Mr.	
		Kandarian, serve as Co-Trustees without	
		bond (signed Trustee Consent to serve filed 9/9/2013);	
		~Please see additional page~	
		ricase see additional page	

First Additional Page 2, Daniel Kandarian (SNT)

Case No. 13CEPR00796

Petitioner requests the Court order that:

- 1. The Court will establish the **DANIEL KANDARIAN SPECIAL NEEDS TRUST**, that Petitioner is directed to execute it, and that the Court has continuing jurisdiction over the SNT;
- 2. Tom Avedesian and Louise Avedesian, as the first cousins of the proposed SNT Beneficiary, who have been paying for Daniel Kandarian's needs out of their own pockets for years up to this point in time, shall serve as Co-Trustees with bond as determined by the Court;
- 3. Daniel Kandarian has a disability that substantially impairs his ability to provide for his own care or custody, and constitutes a substantial handicap;
- 4. Daniel Kandarian is likely to have special needs that will not be met without the trust;
- 5. Money paid to the SNT does not exceed the amount that appears reasonably necessary to meet Daniel Kandarian's special needs;
- 6. Payment of all monies due [Daniel Kandarian as proposed SNT Beneficiary] from Suzanne Cooper, in her capacity as Successor Trustee of the Wanda Kandarian Trust, shall be paid to the Trustee of the [Daniel Kandarian] Special Needs Trust;
- 7. Any proceeds of the settlement shall not be considered received by [Daniel Kandarian as proposed SNT Beneficiary] for public benefit eligibility purposes;
- 8. The assets of the SNT are unavailable to the proposed SNT Beneficiary and shall not constitute a resource for eligibility purposes for Medi-Cal, SSI, regional center assistance, or any other program of public benefits;
- 9. All statutory liens in favor of the State Department of Health Services, State Department of Mental Health, the State Department of Developmental Services, and any county or city and county in California must first be satisfied pursuant to Probate Code §3604(d); and
- 10. The SNT is subject to the Court's continuing jurisdiction unless otherwise specified, and is subject to periodic accounts and reports for court approval as required in conservatorship matters.

Kruthers, Heather H (for the Public Administrator/successor Administrator)
Status Hearing Re: Failure to File a First Account or Petition for Final Distribution Atty

DOD: 0/1//0000	DANNY EVERHART was supposited at as	F
DOD: 9/16/2002	DANNY EVERHART was appointed as	NEEDS/PROBLEMS/COMMENTS:
	Administrator with Will Annexed, with full	
	IAEA authority and bond of \$33,000.00	
	on 1/7/2003.	0 041
Cont. from 121313	Pond was filed on 2/7/2002 and Letters	OFF CALENDAR. Petition for Final
Aff.Sub.Wit.	Bond was filed on 2/7/2003 and Letters issued.	Distribution filed and set for 4/2/14.
	1550ea.	
Verified	Danny Everhart was removed as	
Inventory	Administrator by minute order dated	
PTC	= 4/28/2005 and the PUBLIC	
Not.Cred.	ADMINISTRATOR was appointed	
Notice of	successor Administrator.	
Hrg		
Aff.Mail	Letters issued to the Public Administrator	
Aff.Pub.	on 5/31/2005.	
Sp.Ntc.		
Pers.Serv.	Order for Surcharge against Danny	
	Everhart in the amount of \$61,740.46	
Conf.	was entered on 11/21/2006.	
Screen	Dintf	
Letters	Receipt of payment of \$33,000.00 on	
Duties/Supp	the bond was filed on 1/27/2007.	
Objections	Notice of Status Hearing was mailed to	
Video	Attorney Heather Kruthers on	
Receipt	10/31/2013.	
CI Report		
9202	Status Report filed on 12/12/13 states	
Order	County Counsel is currently working on	
Aff. Posting	the first and final account, it is apparent	Reviewed by: KT
Status Rpt	that it will not be filed prior to the status	Reviewed on: 2/25/14
UCCJEA	hearing. It is anticipated that the account will be filed sometime next	Updates:
Citation	week. Therefore it is requested that the	Recommendation:
FTB Notice	status hearing be continued for 30 days.	File 3 – Bohn-Everhart
	states fieding se commised for ou days.	

4 Anita Lucchesi (Estate)

Case No. 08CEPR01101

Atty

Fanucchi, Edward L. (for Joann Soria – Successor personal representative)

Probate Status Hearing for Failure to File a Second Account or Petition for Final Distribution

DC	D: 10/01/08	JACK LUCCHESI, son, was appointed Executor	NEEDS/PROBLEMS/COMMENTS:
		without bond on 12/16/08 and Letters	
		Testamentary were issued on 12/17/08.	CONTINUED FROM 01/23/14
		On 09/23/10, Jack Lucchesi resigned as	As of 02/25/14, nothing further
Со	ont. from 110113,	Executor.	has been filed in this matter.
01:	2314		Need Final Accounting
	Aff.Sub.Wit.	On 11/10/10, JoAnn Soria, daughter, was	and Petition for Final
	Verified	appointed as Administrator with Will Annexed	Distribution <u>or</u> Verified
	Inventory	without bond and Letters of Administration were issued to her on 11/10/10.	Status Report.
	PTC	were issued to her off 11/10/10.	
	Not.Cred.	The First and Final Account and Report of	
	Notice of	Former Personal Representative, Petition for	
	Hrg	Settlement, and for Waiver of Commission was	
	Aff.Mail	filed 12/28/10 and the Order Settling First and	
	Aff.Pub.	Final Account and Report of Former Personal Representative, Petition for Settlement, and for	
	Sp.Ntc.	Waiver of Commission, was filed 05/25/11.	
	Pers.Serv.	, , , , , , , , , , , , , , , , , , , ,	
	Conf.	Notice of Status Hearing filed 08/30/13 set this	
-	Screen	matter for hearing regarding Status of the	
	Letters	Second Account and/or Petition for Final	
	Duties/Supp	Distribution on 11/01/13. Clerk's Certificate of Mailing states that a copy	
	Objections	of the Notice of Status Hearing was mailed to	
	Video	Edward L. Fanucchi on 08/30/13.	
-	Receipt		
-	CI Report	Status Report filed 10/31/13 states: The only	
-	9202	substantial asset of the estate is a ½ interest in 20 acres of land with a residence that is	
 	Order	currently occupied by Jack Lucchesi.	Paviawad by
	Aff. Posting Status Rpt	Distribution is not yet in order because of a	Reviewed by: JF Reviewed on: 02/25/14
	UCCJEA	dispute with regard to the interest of the heirs	Updates:
	Citation	and the rights of the heirs in the 20 acre	Recommendation:
	FTB Notice	parcel. The estate should be ready for	File 4 – Lucchesi
		distribution in January 2014 and a continuance until late January 2014 is requested.	
		orminate sameary zora is requested.	
		Status Report filed 01/23/14 states that the	
		personal representative is unavailable to	
		appear on 01/23/14. The attorney will appear	
		and request a continuance to mid- February.	

Fanucchi, Edward L. (for Administrator JoAnn Soria)

Probate Status Hearing Re: Failure to File an Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

DC	D: 4/23/10	JoANN SORIA was appointed as	NEEDS/PROBLEMS/COMMENTS:
		Administrator, with full IAEA authority	
		and without bond, on 11/8/2010.	
			 Need inventory and appraisal
<u></u>	ont. from 011714	Letters issued on 11/8/2010.	and first account, petition for final
			distribution <u>or</u> current written
l <u> </u>	Aff.Sub.Wit.	Inventory and Appraisal was due March	status report pursuant to Local
	Verified	2011.	Rule 7.5 which states in all matters set for status hearing verified
	Inventory	The Department of Health Services filed	status reports must be filed no
	PTC	a creditor's claim on 12/12/12 in the	later than 10 days before the
	Not.Cred.	amount of \$74,720.18.	hearing. Status Reports must
	Notice of		comply with the applicable code
	Hrg	First Account or Petition for Final	requirements. Notice of the status
	Aff.Mail	Distribution was due December 2011.	hearing, together with a copy of
	Aff.Pub.	Nakaa af Chahaa Haasiin aa waxaa aa aila ah ba	the Status Report shall be served
	Sp.Ntc.	Notice of Status Hearing was mailed to attorney Edward Fanucchi and to	on all necessary parties.
	Pers.Serv.	Administrator JoAnn Soria on	
	Conf.	11/18/2013.	
	Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		Reviewed by: KT
	Status Rpt		Reviewed on: 2/25/14
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 5 – Lucchesi

Hemb, Richard E. (for Mary Leigh Jorgensen – daughter/Administrator)
Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

DOD: 06/16/12		MARY LEIGH JORGENSEN, daughter,	NEEDS/PROBLEMS/COMMENTS:
333.00/10/12		was appointed Administrator without	
		bond on 09/04/12. Letters of	CONTINUED FROM 12/13/13
		Administration were issued on 09/07/12.	Minute order from 12/13/13 states:
			Counsel informs the Court that the
Cont. from 1025	13,	Status Conference Statement filed	only thing left is the sale of one
121313	1	12/13/13 states: The administrator has	piano.
Aff.Sub.Wit.		sold the decedent's real property and	
Verified		performed all other functions in	1 Nove 1 Avenue 19 veneral (veneral)
Inventory		administering the estate. The only	Need Accounting and/or Petition for Distribution.
PTC		action remaining is to sell the decedent's antique piano with an	retition for distribution.
Not.Cred.		estimated date of death value of	
Notice of		\$5,000.00.	
Hrg		•	
Aff.Mail		Status Conference Statement filed	
Aff.Pub.		02/26/14 states: there has been no	
Sp.Ntc.		change since the last status	
Pers.Serv.		conference, the only remaining action is to sell decedent's antique piano.	
Conf.		is to sell decedent s armique plane.	
Screen			
Letters			
Duties/Supp			
Objections			
Video			
Receipt			
CI Report			
9202			
Order			
Aff. Posting			Reviewed by: JF
Status Rpt			Reviewed on: 02/27/14
UCCJEA			Updates:
Citation			Recommendation:
FTB Notice			File 6 – Storey

Amador, Catherine A. (for Christina Tolman – Conservator)
Status Hearing Re: Filing of the First Account

Ag	e: 68	CHRISTINA TOLMAN, daughter, was	NEEDS/PROBLEMS/COMMENTS:
		appointed Conservator of the Person and Estate on 10/30/12 with bond set at	CONTINUED FROM 12/20/13
		\$38,920.00. Bond was filed on 11/30/12	Minute order from 12/20/13 states:
		and Letters of Conservatorship were	Counsel requests a continuance to
	ml from 100012	issued on 12/03/12.	obtain all of the Kentucky records.
Co	ont. from 122013	w: 1 0 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 November 1
	Aff.Sub.Wit.	Minute Order from hearing on 10/30/12 set this matter for status regarding filing	 Need First Account and report of Conservator.
	Verified	of the First Account on 12/20/13.	of Conservator.
	Inventory		
	PTC	Inventory & Appraisal, final filed	
	Not.Cred.	03/21/13 - \$328,440.00	
	Notice of		
	Hrg Aff.Mail	Additional bond was filed 05/16/13, total current bond amount - \$319,064.80	
		101ai Coiteiti botta attiootti - \$317,004.00	
	Aff.Pub.	Status Conference Statement filed	
	Sp.Ntc.	12/13/13 states: at the time this	
	Pers.Serv.	conservatorship was established, a	
	Conf. Screen	guardianship/conservatorship also	
	Letters	existed in Kentucky where the conservatee lived previously. The	
		Conservator has been working with the	
	Duties/Supp Objections	conservator/guardian in Kentucky,	
	Video	Peter Brown, to wind up the Kentucky	
	Receipt	proceeding and that process is not yet	
	CI Report	complete.	
	9202	The Conservator is also taking finals and	
	Order	completing numerous research papers	
	Aff. Posting	for her master's program and will not	Reviewed by: JF
	Status Rpt	complete those until 12/11/13.	Reviewed on: 02/25/14
	UCCJEA	Additionally, this is the busiest time of year for the conservator's work	Updates:
	Citation	schedule. Due to these factors, the	Recommendation:
	FTB Notice	Conservator requests an additional 60	File 7 – Tolman
		days to complete the accounting.	

Knudson, David N. (for Administrator Gwen G. Hemminger)
Status Hearing Re: Filing of the Inventory and Appraisal

with bond of \$550,000.00 on 5-1-13. Bond was filed and Letters issued on 6-26-13. Cont. from 100413, 011714 Aff.Sub.Wit. On 5-1-13, the Court set this status hearing for filing the Inventory and Appraisal. On 5-1-13, the Court set this status hearing for filing the Inventory and Appraisal. Status Report of Administrator filed Note: The Administrator resides in Pensacola, Florida. Continued from 10-4-13 Minute Order 10-4-13: Counsel informs the Court that the status report was filed yesterday and he was filing a partial inventory soon. Matter continued to 1-17-14.	DOD:1-22-13	GWEN G. HEMMINGER, Daughter, was	NEEDS/PROBLEMS/COMMENTS:
Cont. from 100413, 011714 Aff.Sub.Wit. Verified Inventory PTC Status Report of Administrator filed Pensacola, Florida. Continued from 10-4-13 Continued from 10-4-13: Minute Order 10-4-13: Counsel informs the Court that the status report was filed yesterday and he was the continued to 1-17-14.		appointed Administrator with Full IAEA	
Bond was filed and Letters issued on 6-26-13.		with bond of \$550,000.00 on 5-1-13.	
Cont. from 100413, 011714 Aff.Sub.Wit. On 5-1-13, the Court set this status hearing for filing the Inventory and Appraisal. On 5-1-13, the Court set this status hearing for filing the Inventory and Appraisal. Minute Order 10-4-13: Counsel informs the Court that the status report was filed yesterday and he was filing a partial inventory soon. Matter continued from 10-4-13 Minute Order 10-4-13: Counsel informs the Court that the status report was filed yesterday and he was filing a partial inventory soon. Matter continued from 10-4-13		Bond was filed and Letters issued on	Pensacola, Florida.
On 5-1-13, the Court set this status hearing for filing the Inventory and Appraisal. Minute Order 10-4-13: Counsel informs the Court that the status report was filed yesterday and he was filing a partial inventory soon. Matter continued to 1-17-14.	Cont. from 100413,		Continued from 10-4-13
Verified hearing for filing the Inventory and Inventory Appraisal. Inventory PTC Status Report of Administrator filed Matter continued to 1-17-14.	011714	0 20 10.	<u> </u>
Inventory Appraisal. report was filed yesterday and he was filed yesterday.	Aff.Sub.Wit.	On 5-1-13, the Court set this status	
PTC Status Report of Administrator filed be filing a partial inventory soon. Matter continued to 1-17-14.	Verified	,	
PTC Status Report of Administrator filed Matter continued to 1-17-14.	Inventory	Appraisal.	
	PTC	Status Poport of Administrator filed	,
The state of the s	Not.Cred.	10/03/13 states: It has not been possible	Maner Committee to 1-17-14.
Notice of to file a complete Inventory & Appraisal Minute Order 1-17-14: Counsel	Notice of		Minute Order 1-17-14: Counsel
	Hrg		advises the Court that the inventory
Aff.Mail further investigate the assets of the has been prepared and it's only a	Aff.Mail		
Aff.Pub. estate. The Decedent had numerous matter of getting it to Florida.	Aff.Pub.		matter of getting it to Florida.
Sp.Ntc. The administrator has discovered that Note: On 2-20-14, I&A Partial No. 1	Sp.Ntc.		Note: On 2-20-14 ISA Partial No. 1
Pers.Serv. some of the accounts may have been was filed indicating \$224,751.21 in	Pers.Serv.		The state of the s
	Conf.	•	cash; however, as of 2-25-14, nothing
Screen entirely and is currently looking in to all further has been filed.	Screen	=	further has been filed.
Letters of the assets. The Administrator requests	Letters	· ·	
Duties/Supp a continuance. 1. Need Final Inventory and Appraisal or verified written state	Duties/Supp	a confinuance.	Need <u>Final</u> Inventory and Appraisal or verified written status
Objections report (updated).	Objections		
Video			repoir (opudica).
Receipt	- 		
CI Report			
9202			
Order			
Aff. Posting Reviewed by: skc			
Status Rpt Reviewed on: 1-16-14			
UCCJEA Updates:		_	
Citation Recommendation:		-	
FTB Notice File 8 - Green	LIR NOUCE		

Garcia, Robert V. (for Michael John Perez – Executor)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 2 04 12	ANCHAEL JOHN DEDET was such sisted	
DOD: 3-24-13	MICHAEL JOHN PEREZ was appointed	NEEDS/PROBLEMS/COMMENTS:
	Executor with Full IAEA without bond on	Canton al form 11 1 10 1 04 14
	5-30-13. Letters issued on 6-4-13.	Continued from 11-1-13, 1-24-14
	0 - 5 00 10 11 - 0 - 1 - 1 11 1 - 1 - 1	
Cont. from 110113,	On 5-30-13, the Court set this status	Minute Order 11-1-13: Mr. Garcia is
012414	hearing for the filing of the Inventory	appearing via CourtCall. The Court is
Aff.Sub.Wit.	and Appraisal.	advised that progress is being made.
		Minute Order 1 24 14: Mr. Carior is
Verified		Minute Order 1-24-14: Mr. Garica is
Inventory		appearing via CourtCall. Continued to 2-28-14.
PTC		10 2-28-14.
Not.Cred.		As of 2-25-14, nothing further has
Notice of		been filed.
Hrg		
Aff.Mail		1. Need Inventory and Appraisal per
Aff.Pub.		Probate Code §8800(b) or written
Sp.Ntc.		status report pursuant to local
Pers.Serv.		rules.
Conf.		
Screen		
Letters		
 		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 2-25-14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 9 – Perez
		9

Atty Teixeira, J. Stanley, sole practitioner (for Administrator Shawn M. Murphy)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 2/26/2013	SHAWN M. MURPHY, son, was appointed	NEEDS/PROBLEMS/COMMENTS:
	Administrator with Full IAEA without bond on	
	7/11/2013.	Continued from 12/13/2013.
	.	Minute Order [Judge
Cont. from 121313	Letters issued on 7/12/2013.	Hamilton] states no
Aff.Sub.Wit.		appearances. Matter
	Pursuant to Probate Code § 8800(b), Final	continued to 2/28/2014. The Court orders Stanley Teixeira
Verified	Inventory and Appraisal was due 11/11/2013.	to be personally present on
Inventory X	invertiory and Appraisar was about 1711/2010.	2/28/2014. The Court directs
PTC		that a copy of the <i>Minute</i>
Not.Cred.	Minute Order dated 7/11/2013 from the	Order be sent to Stanley
Notice of	hearing on the petition for letters of	Teixeira. [Note: Clerk's
Hrg	administration set the matter for a Status	Certificate of mailing shows a
Aff.Mail	Hearing for filing of the final inventory and	copy of the Minute Order
Aff.Pub.	appraisal on 12/13/2013.	dated 12/13/2013 was sent to
Sp.Ntc.		Attorney Teixeira on 12/13/2013.]
Pers.Serv.	Status Report/Declaration of J. Stanley Teixeira	12,13,2013.]
Conf.	filed 2/18/2014 states:	1. Need Final Inventory and
Screen	The final Inventory and Appraisal was	Appraisal pursuant to
Letters	mailed to the probate referee earlier this	Probate Code § 8800(b),
Duties/Supp	month for appraisal of items identified on	or verified status report
Objections	Attachment 2;	and proof of service of
Video	As of the date of this declaration (2/19/0014) be a representation and the	notice of the status
Receipt	[2/18/2014], he has not yet received the	hearing pursuant to Local
CI Report	Inventory and Appraisal from the probate referee;	Rule 7.5(B).
9202	He will file the Inventory and Appraisal as	
Order		
Aff. Posting	soon as it is received from the probate	Reviewed by: LEG
Status Rpt	referee;	Reviewed on: 2/26/14
UCCJEA	He expects filing of the Inventory and	Updates:
Citation	Appraisal will occur during the month of	Recommendation:
FTB Notice	March, 2014.	File 10 – Murphy
]]		

Atty Horton, Lisa (for Meredith McNeil – Executor)

Status Hearing Re: Filing of the Inventory and Appraisal

	MEREDITH MCNEIL, daughter, appointed	I
	executor with full IAEA authority without	, , , , , , , , , , , , , , , , , , , ,
	bond on 08/26/2013.	
Cont. from	Letters issued on 08/26/2013.	
Aff.Sub.Wit.	Minute order of 08/26/2013 set this	
Verified	status hearing for the filing of the	
	Inventory and Appraisal.	
Inventory	=	
PTC	Status Report filed 02/26/2014 states a	
Not.Cred.	Final Inventory and Appraisal will be	
Notice of	mailed to the Probate Referee, Steven	
Hrg	Diebert, by 02/27/2014. Attorney	
Aff.Mail	Horton asks that this matter be	
Aff.Pub.	continued out for 45 days for further	
Sp.Ntc.	status. It is anticipated that the	
Pers.Serv.	Inventory and Appraisal will be	
Conf.	received and filed within that time.	
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		Reviewed on: 02/25/2014
UCCJEA		Updates: 02/26/2014
Citation		Recommendation:
FTB Notice		File 11 – McNeil

11

Armas, J. Todd (for Brent Kenneth Wise – Executor)

Status Hearing Re: Filing of the Inventory and Appraisal

	Status Hearing Re: riling of the inventory	una Appraisar
	BRENT KENNETH WISE, son, appointed	NEEDS/PROBLEMS/COMMENTS:
	executor with full IAEA authority without	
	bond on 10/02/2013.	OFF CALENDAR INVENTORY
		AND APPRAISAL FILED ON
Cont. from	Letters issued on 10/08/2013.	
		09/18/2013
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		Reviewed on: 02/25/2014
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 12 – Wise
<u> </u>		10

Flanigan, Philip M. (for Robert O. Nicolaysen, III – Administrator)
Status Hearing Re: Filing of the Inventory and Appraisal

	Training Resembly	•
		NEEDS/PROBLEMS/COMMENTS:
		OFF CALENDAR. FIRST AND
		FINAL ACCOUNT FILED
Cont. from		02/18/2014. HEARING SET
Aff.Sub.Wit.		FOR 03/24/2014
Verified		
Inventory		
PTC		
Not.Cred.]	
Notice of	7	
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202	4	
Order	4	
Aff. Posting	4	Reviewed by: LV
Status Rpt	4	Reviewed on: 02/25/2014
UCCJEA	4	Updates:
Citation	4	Recommendation:
FTB Notice		File 13 – Nicolaysen

Atty Amador, Catherine A (for Conservator John Perehoduk)
Status Hearing Re: Filing of the Bond

Age:	JOHN PEREHODUK was appointed	NEEDS/PROBLEMS/COMMENTS:
	conservator of the person and estate	
	with bond set at \$20,750.00 on 2/4/14.	
		OFF CALENDAR. Bond filed on
Cont. from	Minute order dated 2/4/14 set this status hearing for the filing of the bond.	2/26/14.
Aff.Sub.Wit.	Thedring for the liming of the borid.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 2/25/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 14 – Perehoduk

Atty None

Probate Status Hearing Re: Petition for Transfer

			STATE DIRECTOR OF DEVELOPMENTAL	NEEDS/PROBLEMS/COMMENTS:
			SERVICES was appointed conservator	
			on 11/29/1973.	
			Court Investigator JULIE NEGRETE filed	
Со	nt. from	1	a Petition for Transfer on 1/27/14	Note: If the petition is granted, status
	Aff.Sub.Wit.		requesting this proceeding be	hearings will be set as follows:
✓	Verified		transferred to Tulare County because	
	Inventory		the conservatee has resided there for	• Friday, May 2, 2014 at 9:00 a.m.
	PTC		the past 29 years and it is presumed	in Department 303, for the filing of the receipt of transfer.
	Not.Cred.		pursuant to Probate Code §2215 that	or the receipt of flatister.
✓	Notice of Hrg		transfer of the conservatorship case to the county of residence is in the best	
✓	Aff.Mail	W/	interests of the conservatee.	
	Aff.Pub.		Court Investigator further recommends	
	Sp.Ntc.		that the fees and costs related to this	
	Pers.Serv.		transfer be waived.	
	Conf.			
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	Cl Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 2/25/14
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 15 – Burchett

Atty Lee, Blia

Status Hearing Re: Filing of the Account or Release from the Ward

Age:	Grands freating Re. Filling of the Accession	NEEDS/PROBLEMS/COMMENTS:
DOD:		
		OFF CALENDAR. Petition for
		Termination filed and set for hearing
Cont. from		on 3/24/14
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 2/25/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 16 – Vang

16

Shepard, Jeff S. (for Celina Gonzalez)

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

	<u> </u>	
Age:		NEEDS/PROBLEMS/COMMENTS:
		OFF CALENDAR. Petition for Final
		Distribution has been filed and is set
Cont. from		for hearing on 3/25/14.
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video]	
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 2/26/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 17 – Noel

Shepard, Jeff S. (for Administrator Vivian West)

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

DOD: 5/23/2005	VIVIAN WEST was appointed as	NEEDS/PROBLEMS/COMMENTS:
505. 3/23/2003	Administrator with full IAEA authority	INCLUS/INCULLIAIS/COMMINICIAIS.
	and without bond on 8/23/05.	
	and williour bond on 0/20/00.	Need first account or petition for
	Letters issued on 8/24/2005.	final distribution.
Cont. from	2011013 133000 011 0/ 2 1/ 2000.	in fair distribution.
Aff.Sub.Wit.	I & A showing the estate valued at	
Verified	\$190,700.00 was filed on 12/12/2005.	
Inventory	Notice of Status Hearing was mailed to	
PTC	Notice of Status Hearing was mailed to attorney Jeff Shepard and Administrator	
Not.Cred.	Vivian West on 11/22/2013.	
Notice of		
Hrg	Status Report of Attorney Jeff Shepard	
Aff.Mail	filed on 2/21/14 states he has been	
Aff.Pub.	unable to contact the Administrator	
Sp.Ntc.	about the Notice of Status Hearing. He has mailed by regular and certified	
Pers.Serv.	mail, return receipt requested to all	
Conf.	known addresses but both letters came	
Screen	back undeliverable. The attorney states	
Letters	he has called the phone number given	
Duties/Supp	to him by Pipkin Detective Agency, however the phone numbers are out of	
Objections	service.	
Video	351.1.501	
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 2/25/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 18 – Baker-Melton

Murillo, Joel M. (for Angelita Garcia – Executor)

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

DOD: 4-15-05	ANGELITA GARCIA, Daughter, was	NEEDS/PROBLEMS/COMMENTS:
	appointed as Executor with Full IAEA	
	without bond and Letters issued on 2-22-06.	Need I&A and/or petition for
		final distribution or verified
	The Executor's Second Amended Petition	written status report pursuant
Aff.Sub.Wit.	estimated the estate to contain real	to Probate Code §12200 and
	property valued at \$155,000; however, no Inventory and Appraisal was ever filed.	local rules.
Verified	inventory and Applaisal was ever filea.	
Inventory	Dept. of Health Care Services filed two	
PTC	creditor's claims on 12-30-05 totaling	
Not.Cred.	\$297,816.16 as well as Requests for Special	
Notice of	Notice.	
Hrg		
Aff.Mail	Notice of Pendency of Action filed 10-16-08	
Aff.Pub.	indicate an action entitled "Sandra	
Sp.Ntc.	Shewry, Director of the Department of Health Care Services vs. Joel M. Murillo, as	
Pers.Serv.	Personal Representative of the Estate of	
Conf.	Elvira Rodriguez, Decedent; and Does 1	
Screen	through 20, inclusive." The nature of the	
Letters	action is a Complaint to Enforce and	
Duties/Supp	Collect Money Due on a Medi-Cal	
Objections	Creditor's Claim for \$41,055.02 pursuant to	
Video	W&I Code §14009.5.	
Receipt	Thereafter, nothing further was filed.	
CI Report		
9202	The Court set this status hearing on 11-22-13	
Order	and sent notice of hearing to Attorney Joel	
Aff. Posting	Murillo on 11-22-13.	Reviewed by: skc
Status Rpt		Reviewed on: 2-25-14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 19 – Rodriguez
		10

Ratzlaff, Ruth E (for Arthur K. O'Brien, Jr. – Executor)

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

	ARTHUR K. O'BRIEN, JR., son, appointed	NEEDS/PROBLEMS/COMMENTS:
	executor with full IAEA authority without	
	bond on 07/14/2006.	Need Inventory and Appraisal
	=	and First Account or Petition for
Coul from	Letters issued on 07/19/2006.	Final Distribution or current written
Cont. from		status report pursuant to Local
Aff.Sub.Wit.	Inventory and Appraisal was due	Rule 7.5 which states in all matters
Verified	12/2006.	set for status hearing verified
Inventory	First Account or Petition for Final	status reports must be filed no later than 10 days before the
PTC	Distribution was due 09/2007.	hearing. Status Reports must
Not.Cred.		comply with the applicable code
Notice of	Notice of Status Hearing was mailed to	requirements. Notice of the status
Hrg	Attorney Ruth E. Ratzlaff and Arthur K.	hearing, together with a copy of
Aff.Mail	O'Brien, Jr. on 11/22/2013.	the Status Report shall be served
Aff.Pub.		on all necessary parties.
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt	<u> </u>	Reviewed on: 02/25/2014
UCCJEA	<u> </u>	Updates:
Citation		Recommendation:
FTB Notice		File 20 – O'Brien
		20

Deaver, Dawna (Pro Per – Executor)

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

		DAWNA DEAVER, daughter, appointed	NEEDS/PROBLEMS/COMMENTS:
		executor with full IAEA authority without	
		bond on 04/04/2006.	Need First Account or Petition for
			Final Distribution or current written
Con	t. from	Letters issued on 04/05/2006.	status report pursuant to Local Rule 7.5 which states in all matters
	Aff.Sub.Wit.	Inventory and Appraisal filed on	set for status hearing verified
١,	Verified	11/27/2006 shows an estate valued at	status reports must be filed no
I	Inventory	\$200,000.00 consisting of real property.	later than 10 days before the
	PTC	First Account or Petition for Final	hearing. Status Reports must comply with the applicable code
	Not.Cred.	Distribution was due 06/2007.	requirements. Notice of the status
	Notice of	7	hearing, together with a copy of
=	Hrg	Notice of Status Hearing was mailed to	the Status Report shall be served
	Aff.Mail	Dawna Deaver on 11/22/2013.	on all necessary parties.
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf.		
_	Screen		
-	Letters		
	Duties/Supp		
\vdash	Objections		
	Video		
	Receipt	=	
—	CI Report	=	
_	9202	-	
	Order	\dashv	Paviawad hyg IV
	Aff. Posting	-	Reviewed by: LV
	Status Rpt UCCJEA	┥	Reviewed on: 02/25/2014 Updates:
	Citation	\dashv	Recommendation:
	FTB Notice	=	File 21 – Buzzard
<u> </u>	TID HONCE	<u> </u>	21 - 5022414

Mortimer, Steven R (for Roque Rodriguez – Administrator)

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

	ROQUE RODRIGUEZ., son, appointed	NEEDS/PROBLEMS/COMMENTS:
	administrator with full IAEA authority	
	with bond set at \$22,500.00 on	Need First Account or Petition for
	03/07/2006.	Final Distribution or current written
Cont. from		status report pursuant to Local
Aff.Sub.Wit.	Letters issued on 03/16/2006.	Rule 7.5 which states in all matters
	Inventory and Appraisal filed	set for status hearing verified status reports must be filed no
Verified	Inventory and Appraisal filed 03/16/2006 shows an estate valued at	later than 10 days before the
Inventory	\$22,500.00 consisting of real property.	hearing. Status Reports must
PTC	422,000,00 001,001,11,g 01,10 at proporty.	comply with the applicable code
Not.Cred.	First Account or Petition for Final	requirements. Notice of the status
Notice of	Distribution was due 05/2007.	hearing, together with a copy of
Hrg		the Status Report shall be served
Aff.Mail	Notice of Status Hearing was mailed to	on all necessary parties.
Aff.Pub.	Attorney Mortimer and Roque	
Sp.Ntc.	Rodriguez on 11/22/2013.	
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		Reviewed on: 02/25/2014
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 22 – Rodriguez

Nahigian, Eliot S. (for Administrator Lionel H. Ochoa)

Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for Failure to File a First Account or Petition for Final Distribution

	_	Tallore to the a this Account of Tellion I	Т
DOD: 2/1/200	5	LIONEL H. OCHOA was appointed	NEEDS/PROBLEMS/COMMENTS:
		administrator with full IAEA authority	
		and without bond on 8/1/2006.	Need first account or petition for
			final distribution.
Cont. from		Letters issued 8/1/2006.	
l 			
Aff.Sub.Wit	•	I & A was due 1/2006	
Verified		First apparent or potition for final	
Inventory		First account or petition for final distribution was due 10/2007.	
PTC		distribution was add 10/2007.	
Not.Cred.		Status Report filed on 2/24/14 states	
Notice of		there are no assets subject to probate.	
Hrg		Additional time is requested to prepare	
Aff.Mail		a petition to terminate the proceedings	
Aff.Pub.		and discharge the personal	
Sp.Ntc.		representative.	
Pers.Serv.			
Conf.			
Screen			
Letters			
Duties/Sup	р		
Objections	; <u> </u>		
Video			
Receipt			
CI Report			
9202			
Order			
Aff. Posting			Reviewed by: KT
Status Rpt			Reviewed on: 2/25/2014
UCCJEA			Updates:
Citation			Recommendation:
FTB Notice			File 23 – Ochoa

Chielpegian, Michael S (for Executor Virginia Boyajian-Morse)

Probate Status Hearing Re: Failure to File a Petition for Final Distribution

DOD: 5/10/2006	VIRGINIA BOYAJIAN-MORSE was	NEEDS/PROBLEMS/COMMENTS:
	appointed as executor with full IAEA	
	and without bond on 9/5/2006.	
Cont. from	Order settling the second account for the account period ending 8/31/2009	Need petition for final distribution.
Aff.Sub.Wit.	and showing a property on hand	
Verified	balance of \$316,638.78 was signed on	
Inventory	12/2/2006.	
PTC	Notice of Status Hearing was mailed to	
Not.Cred.	Notice of Status Hearing was mailed to attorney Chielpegian and executor	
Notice of	Virginia Boyajian-Morse on 11/22/13.	
Hrg		
Aff.Mail	Ex Parte Order excusing the personal	
Aff.Pub.	appearance of executor Virginia Boyajian-Morse was signed on 1/8/2014.	
Sp.Ntc.	Boyajiari-Morse was signed on 176/2014.	
Pers.Serv.	Status Report filed on 12/18/13 and	
Conf.	Supplemental Status report filed on	
Screen	2/25/14 state the estate is not yet in a	
Letters	condition to close as the estate has insufficient cash on hand to pay the	
Duties/Supp	costs of administration. The remaining	
Objections	property on hand consists of	
Video	undeveloped real property located in	
Receipt	the County of Madera. The executor	
CI Report	has accepted an offer to sell the real property and each beneficiary has	
Order	consented to the sale. Once the sale is	
Aff. Posting	complete the executor will be in a	Reviewed by: KT
Status Rpt	position to bring the estate to a close.	Reviewed by: K1 Reviewed on: 2/26/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 24 – Boyajian

Costales, Brian J. (pro per – Administrator)

Probate Status Hearing Re: Failure to File a First Account or Petition for Final Distribution

DOD: 08/23/02	BRIAN COSTALES, son, was appointed	NEEDS/PROBLEMS/COMMENTS:
	Administrator without bond on 10/24/02.	
	Letters of Administration were issued on	CONTINUED FROM 02/21/14
	10/31/02.	Public Administrator was appointed
Cont. from 111513,	Inventory & Appraisal, Final filed	per Minute Order on 11/15/13.
022114	12/05/02 - \$80,000.00	per miniore eraer en 11, 16, 16.
Aff.Sub.Wit.	·	Letters of Administration were issued
Verified	Notice of Status Hearing filed 09/16/13	to the Public Administrator on
Inventory	set this matter for status. Clerk's	11/25/13.
PTC	Certificate of Mailing indicates that the Notice of Status Hearing was mailed to	As of 02/25/14, nothing further has
Not.Cred.	Brian J. Costales on 09/16/13.	been filed in this matter.
Notice of	2 3. 235.4.35 3 37, 13, 13.	
Hrg	Declaration of Brian Costales filed	 Need Account/Report on
Aff.Mail	09/20/13 states: He was previously	Waiver of Account and
Aff.Pub.	represented by attorney Stanton Levy,	Petition for Distribution.
Sp.Ntc.	who died several years ago. He was appointed Administrator of his mother's	
Pers.Serv.	estate several years ago. To the best of	
Conf.	his recollection, the only asset of the	
Screen	estate was the decedent's residence	
Letters	which was sold and the proceeds of	
Duties/Supp	the sale were distributed between	
Objections	himself and two siblings as directed in	
Video	the decedent's will. Mr. Levy received his fee from the sale proceeds paid	
Receipt	directly to him by escrow. Mr. Levy	
CI Report	advised him that everything was	
9202	complete and as far as he was aware	
Order	there was nothing more to be filed or	
Aff. Posting	accomplished. Mr. Levy died soon after	Reviewed by: JF
Status Rpt	these events took place. It has been a decade since all of this transpired.	Reviewed on: 02/25/14
UCCJEA	Unfortunately, there was a recent fire at	Updates:
Citation	his home (09/10/13) and therefore all of	Recommendation:
FTB Notice	his legal papers were destroyed. Mr.	File 25 – Costales
	Costales further states that his health is	
	poor and hopes this can be resolved	
	quickly so to avoid causing him greater	
	stress and illness.	0.5